

The following pages demonstrate typical training materials used by SunLight Energy Group as part of our training process and sample marketing materials that we provide to clients.



SunLight Energy Group

Training Guide

For

Inside Sales Professional

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Inside Sales Training Model

1. Industry Overview

A. Deregulation

- a) Generation and distribution
- b) Key players - Suppliers, Utilities, Municipalities, Brokers, Consumers
- c) Utilities within the state(s) we work: gas and electric
- d) Deregulated states

B. The Energy Market

- a) How much does energy cost?
- b) What influences pricing?
- c) Reading a bill (parameters for pricing)
- d) Becoming a student of the industry
 - Books
 - Videos (Netflix, Hulu, Amazon, YouTube)
 - Certifications and ongoing training

C. Sunlight Energy Group

- a) Understanding contracts – how we make money
- b) Terms, future-starts, cancellations, ETF's, renewals
- c) Our suppliers
- d) Value selling – our competitive advantage

2. Using Our CRM database

A. Creating Leads

- a) Proper formatting
- b) Importing leads

B. Editing Leads

- a) Qualifying Information

C. Maintaining Leads

- a) Notes
- b) Tasks

D. Converting Leads to Deals

- a) CXD

E. Creating and Using Events

- a) Syncing to calendars

F. Navigating and Cross Referencing

- a) Company name (alternates), using D&B, contact name, phone number, asterisk
- b) Finding duplicates
- c) Hyperlinks

G. Attaching Bills, LOE's and LOAs'

3. Organization and Productivity

A. Lead Code System

- a) Rotating call pattern
- b) Depleting and replenishing
- c) Planning your week

B. Utilizing Tasks

- a) When and how to use a task
- b) Updating/deleting a task
- c) Prioritizing your calling
 - Drop-by's, visits, and brand building

C. Dial/Appointment Sheets

- a) Making a plan – goals
- b) Protecting your time – time blocking
- c) Accountability – partner
- d) Tracking your behaviors

D. CRM Reports

E. Prospecting Reports (Dial Analysis, Meeting Analysis)

F. Dropbox – never lose a file

G. Outlook Email and Calendar

H. Scanner, Printer, Fax

4. Prospecting for Business

A. Cold Calling

- a) Planning – make the plan the day before, first location by 8 a.m., ready to go
- b) Where to go
 - General – industrial parks
 - Specific – all similar businesses (i.e. hotels)
- c) How to get there - batchgeo, Road Warrior
- d) What to bring – marketing folder, brochures, business cards
- e) What information should to gather – contact plus parameters for pricing
- f) What to do with the information
 - Importing, setting up follow up tasks and using the subject field

B. From Our Database – finding abandoned leads

- a) Lead views
- b) Filtering our database

C. Web search

- a) Google search
- b) Google maps
- c) Dunn and Bradstreet
- d) LinkedIn
- e) Reference USA

D. Niche Searching

- a) Specialized markets
- b) Reference USA – NAICS codes

E. Asking for Referrals

- c) Clients
- d) Prospects
- e) Connections (friends and family)
- f) Business next door or close by customers

5. Setting Appointments

A. Dials

- a) Who will answer the phone?
 - Getting past the gatekeeper
 - How to handle Executive Assistants
- b) What to say once you've reached the decision maker
- c) Rebuttals
- d) Strategy – conversation about energy strategy between professionals

B. Qualifying Leads

- a) Qualifications
 - Size/usage
 - CXD
 - Decision maker

C. Confirming the Meeting

- a) Email address
- b) Physical address
- c) Calendar invite
- d) Up-front contracts.
- e) Follow up tasks – re-confirming the meeting

D. Creating Events

- a) Linking Zoho with Outlook
- b) Information outside sales person needs in calendar
 - a. Phone, email, correct address of the meeting
 - b. Dropping-by opportunities close by to a meeting

6. Pricing and Contracts

A. Matrix Pricing – using Box

- a) Necessary stats – S-U-R-U-S
- b) Navigating bills
- c) Navigating BOX

B. Custom Pricing

- a) Submission process
- b) Bills, LOA, LOE
- c) Refreshing
- d) Rejection, competition

C. Contracts

- a) Creating matrix contracts in BOX
- b) Saving to PDF
- c) Checking account numbers, start date, term, price, all customer information
- d) Review with operations staff

D. Requesting a Custom Contract

- a) Choosing suppliers
- b) Contract checklist

E. Marking up a contract

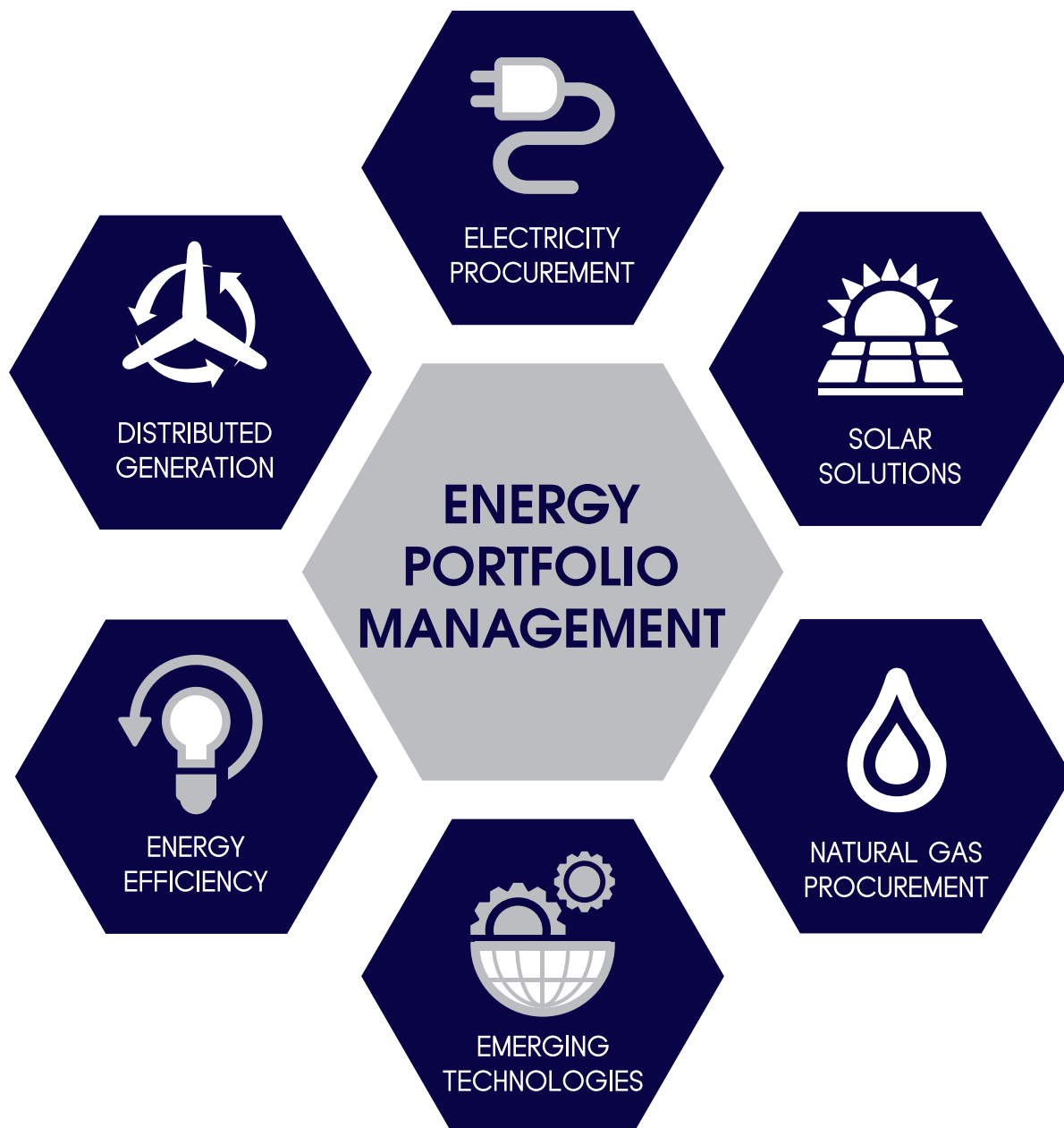
- a) No margin information
- b) Double check all information
- c) Signature and initial requirements, highlight and mark (non-color printers)



Sunlight Energy Group

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We create comprehensive, start-to-finish energy management plans for our clients:
hedging market volatility, securing the lowest cost for the long term,
and tapping into emerging technologies.



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SUNLIGHT ENERGY MANAGEMENT TEAM



**SunLight
Energy
Group**



Jim Mumm, Executive Vice President

Over 33 years' experience helping commercial clients with strategy, energy management, and cost reduction. Led the highest-performing team at a Northeastern energy consulting firm. Extensive experience with regional power pools, energy usage reduction, complex accounts, procurement, and best-practices energy management systems. Certified Energy Professional (CEP). B.B.A. in Marketing, M.S. in Business Computer Information Systems, and M.B.A. in Management from CUNY – Baruch College in NYC.



Doug Pendley, Executive Vice President

Extensive background in sales, product development, channel distribution and company strategy. Served in a variety of leadership roles in companies focused on consumer products, specialty pet products, and information technologies. Key roles include CEO of Milk Pet North America, sales strategist for PetSmart brands, team leader on product strategy at EDS. A.A. degree in Marketing from Southwestern University. Additional studies in Marketing at Western Michigan University.

Stacey Hughes, Chief Financial Officer

Co-founder of company in 2009. More than 15 years' experience in renewable energy finance. Managing Director (Fixed Income Derivatives) at Societe Generale. Analyst at Salomon Brothers (Capital Markets and Financial Institutions Group). B.S. degree in Finance from California Polytechnic University. M.B.A. from Harvard Business School.



Ed Klehe, Chief Investment Officer

Co-founder of company in 2009. Extensive background in project finance, solar development, derivatives and tax equity. Raised investment funds and managed the construction, acquisition and ongoing operations of more than 45 MW of solar energy projects. Managing Director and Group Head (Structured Credit and Principal Finance). Masters degree from H.E.C. School of Management in Paris.



**SunLight
General
Capital**

Bill Zachary, Chief Development Officer

Co-founder of company in 2009. Extensive background in military housing, municipal debt, derivatives and renewable energy via public-private partnerships. Managing Director and Group Head (Municipal Finance). Analyst at Smith Barney (Municipal Finance). B.A. degree from Harvard. Additional studies at the Harvard Kennedy School of Government.



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Sunlight General Capital

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Sunlight General Capital Solar Projects

FEATURED PROPERTIES:

Morris College, NJ,
Mercer College, NJ,
Black Rock Church, CT,
Teterboro Airport, NJ

About Sunlight General's awesome solar capabilities dtkasdfsakdgjaosgdgh gasg
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